

PERFORMANCE OBJECTIVES AND STANDARDS OF PERFORMANCE



a sample of tribal government jobs

PERFORMANCE OBJECTIVES AND STANDARDS OF PERFORMANCE:
A SUPPLEMENT TO THE
SUPERVISORS' PERFORMANCE APPRAISAL MANUAL
FOR THE
CONFEDERATED SALISH AND KOOTENAI TRIBES
OF THE FLATHEAD RESERVATION

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U.S. OFFICE OF PERSONNEL MANAGEMENT
DENVER REGION
WORKFORCE EFFECTIVENESS AND DEVELOPMENT DIVISION

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INTRODUCTION

This guide is an illustration of performance objectives and standards that have been written for six different kinds of jobs. As such, it is a supplement to the Supervisors' Performance Planning and Review Manual. It is for the use of supervisors, managers and employees who are responsible for evaluating employees' job performance or who must write performance objectives and standards for their own job.

The sample objectives and standards have been developed from a review of written job descriptions, some performance evaluation forms completed by Confederated Salish and Kootenai Tribal (CS&KT) employees and other material as appropriate. The samples show what objectives and activities might look like for a particular job (or position). Of course an individuals job duties may be different than the example provided. In that case the example can be modified and only those parts that apply may be used. In any case, it is still going to be up to the individual supervisor or employee to determine how many performance standards or activities need to be written for each performance objective (see Chapter IV, page 6, of the Supervisors' Manual). And each writer must decide how best to describe the objectives and standards and whether they are appropriate or not.

BOOKKEEPING AND ACCOUNTING POSITIONS

Elements

- A) Maintains accounts and records.
- B) Prepares and reconciles financial reports with other records.
- C) Prepares payroll and maintains pay records.
- D) Provides input to budgetary process.
- E) Provides technical guidance and assistance to staff and management.
- F) Processes accounting data for input and output from computer.
- G) Handles or processes source documents.

A) PERFORMANCE OBJECTIVE: Maintains accounts and records.

Weight _____
(Multiplied by)
Performance Value _____
Total _____

Standards of Performance:

a. Prepares journal entries for transactions.

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

b. Posts entries to ledger

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

c. Makes adjustments, corrections and updates to the data.

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

d. Balances computer printouts against entries made in ledgers.

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

e. Keeps records of tribal income and interest earned on deposits and treasury bills.

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

Overall Performance Rating for Objective

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

B) PERFORMANCE OBJECTIVE: Prepares and reconciles financial reports with other records.

Weight _____
(Multiplied by)
Performance Value _____
Total _____

Standards of Performance:

- a. Prepares a trial balance of the recorded transactions of the previous period; Lists the balances of all ledger accounts.

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

- b. Prepares financial statements in a timely and accurate manner.

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

- c. Prepares special reports that are accurate and timely.

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

- d.

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

- e.

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

Overall Performance Rating for Objective:

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

Weight _____
(Multiplied by)
Performance Value _____
Total _____

a. Verifies information, checks forms or documents; sorts information; prepares new forms.

b. Compiles and keeps records of figures; updates information in a timely manner.

c. Processes and distributes pay checks.

d. Prepares quarterly tax reports and other reports (e.g., wage and tax statements).

e.

f.

Overall Performance Rating for Objective:

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

D) PERFORMANCE OBJECTIVE: Provides input to the budgetary process.

Weight _____
(Multiplied by)
Performance Value _____
Total _____

Standards of Performance:

a. Assists in budget preparation.

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

b. Monitors budget expenditures to assure program is managed within financial limits.

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

c.

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

d.

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

Overall Performance Rating for Objective:

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

E) PERFORMANCE OBJECTIVE: Provides technical guidance and assistance to staff and management.

Weight _____
(Multiplied by)
Performance Value _____
Total _____

Standards of Performance:

a. Consults with program managers on problems.

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

b. Gives information on changes that affect the accounting system records and requirements.

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

c.

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

d.

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

Overall Performance Rating for Objective:

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

Weight _____
(Multiplied by)
Performance Value _____
Total _____

a. Codes information onto forms.

b. Checks for required code on source documents.

c. Checks records for mistakes or completeness.

d. Operates computer terminal to enter data from source material.

e. Updates data files.

f. Collects data, stores it for later processing.

Overall Performance Rating for Objective:

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

G) PERFORMANCE OBJECTIVE: Handles or processes source documents.

Weight _____
(Multiplied by)
Performance Value _____
Total _____

Standards of Performance:

a. Records data for further processing.

____ Outstanding ____ Above ____ Satisfactory ____ Needs ____ Unacceptable
 Standard Improvement

b. Retains copies or records of data for future reference or for processing.

____ Outstanding ____ Above ____ Satisfactory ____ Needs ____ Unacceptable
 Standard Improvement

c.

____ Outstanding ____ Above ____ Satisfactory ____ Needs ____ Unacceptable
 Standard Improvement

d.

____ Outstanding ____ Above ____ Satisfactory ____ Needs ____ Unacceptable
 Standard Improvement

Overall Performance Rating for Objective:

____ Outstanding ____ Above ____ Satisfactory ____ Needs ____ Unacceptable
 Standard Improvement

CLERICAL AND SECRETARIAL POSITIONS

Elements

- A) Types a variety of narrative and statistical material.
- B) Gives, receives and records information by phone and in person concerning programs, activities, and other matters.
- C) Establishes and maintains records and files. Sorts, handles, and distributes communications and records.
- D) Obtains, organizes and compiles information and data.
- E) Makes arrangements and coordinates or schedules events.
- F) Records transactions, and maintains accounts; computes figures for reports, documents and recordkeeping. Processes requests, applications, documents, etc.

A) PERFORMANCE OBJECTIVE: Types a variety of narrative and statistical material.	(Multiplied by)	Weight	_____
		Performance Value	_____
		Total	_____

Standards of Performance:

- a. Completes typing assignments within a reasonable amount of time or notifies supervisor promptly when deadline will not be met.

_ Outstanding	_ Above Standard	_ Satisfactory	_ Needs Improvement	_ Unacceptable
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- b. Uncorrected errors are infrequent.

_ Outstanding	_ Above Standard	_ Satisfactory	_ Needs Improvement	_ Unacceptable
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- c. Typed final materials returned to originator have been proofread, are usually free from errors and changes/corrections are properly made.

_ Outstanding	_ Above Standard	_ Satisfactory	_ Needs Improvement	_ Unacceptable
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- d. Final materials provided to originator are arranged, and formatted properly, and include necessary attachments.

_ Outstanding	_ Above Standard	_ Satisfactory	_ Needs Improvement	_ Unacceptable
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Overall Performance Rating for Objective

_ Outstanding	_ Above Standard	_ Satisfactory	_ Needs Improvement	_ Unacceptable
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B) PERFORMANCE OBJECTIVE: Gives, receives and records information by phone and in person concerning programs, activities, and other matters.	Weight (Multiplied by) Performance Value	_____ _____ _____
	Total	_____

Standards of Performance:

a. Contacts are courteous and businesslike; information is relayed accurately.

<u> </u> Outstanding	<u> </u> Above Standard	<u> </u> Satisfactory	<u> </u> Needs Improvement	<u> </u> Unacceptable
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b. Handles inquiries on clerical or routine administrative aspects of programs and activities; handles other general, routine inquiries.

<u> </u> Outstanding	<u> </u> Above Standard	<u> </u> Satisfactory	<u> </u> Needs Improvement	<u> </u> Unacceptable
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c. On more complex inquiries knows which staff person handles a particular program area.

<u> </u> Outstanding	<u> </u> Above Standard	<u> </u> Satisfactory	<u> </u> Needs Improvement	<u> </u> Unacceptable
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d. Receives office or tribal complex visitors: greets them (addressing, welcoming, making introductions as appropriate).

<u> </u> Outstanding	<u> </u> Above Standard	<u> </u> Satisfactory	<u> </u> Needs Improvement	<u> </u> Unacceptable
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e. Gets information from visitors, clients or callers in regard to the purpose of the contact or to their needs.

<u> </u> Outstanding	<u> </u> Above Standard	<u> </u> Satisfactory	<u> </u> Needs Improvement	<u> </u> Unacceptable
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f. Assists people in finding desired office (or person) and in filling out forms: gives directions.

<u> </u> Outstanding	<u> </u> Above Standard	<u> </u> Satisfactory	<u> </u> Needs Improvement	<u> </u> Unacceptable
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Element B) Continued

- g. Determines who can best accommodate visitor, making referrals as necessary.

<u>Outstanding</u>	<u>Above Standard</u>	<u>Satisfactory</u>	<u>Needs Improvement</u>	<u>Unacceptable</u>
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- h. Takes and transcribes dictation, minutes and notes, or makes tape recordings, (makes draft and final copies): the transcript is accurate and completed in a timely manner.

<u>Outstanding</u>	<u>Above Standard</u>	<u>Satisfactory</u>	<u>Needs Improvement</u>	<u>Unacceptable</u>
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- i. Follows-up on clients after they have completed treatment.

<u>Outstanding</u>	<u>Above Standard</u>	<u>Satisfactory</u>	<u>Needs Improvement</u>	<u>Unacceptable</u>
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Overall Performance Rating for Objective

<u>Outstanding</u>	<u>Above Standard</u>	<u>Satisfactory</u>	<u>Needs Improvement</u>	<u>Unacceptable</u>
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C) PERFORMANCE OBJECTIVE: Establishes and maintains records and files. Sorts, handles, and distributes communications and records.	Weight	_____
	(Multiplied by)	
	Performance Value	_____
	Total	_____

Standards of Performance:

- a. Devises and sets up files to store and retrieve information: Filed items are ready and easy to access and use; problems are infrequent; materials are filed neatly, accurately and promptly.

<u> </u> Outstanding	<u> </u> Above Standard	<u> </u> Satisfactory	<u> </u> Needs Improvement	<u> </u> Unacceptable
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- b. Maintains security of confidential, sensitive information: Follows standard operating procedure; locks/unlocks files; limits access to files.

<u> </u> Outstanding	<u> </u> Above Standard	<u> </u> Satisfactory	<u> </u> Needs Improvement	<u> </u> Unacceptable
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- c. Maintains reference sources (e.g., handbooks, manuals, etc.)

<u> </u> Outstanding	<u> </u> Above Standard	<u> </u> Satisfactory	<u> </u> Needs Improvement	<u> </u> Unacceptable
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- d. Makes copies of papers, documents and items for recordkeeping, use as attachments, etc.: Follows standard operating procedures.

<u> </u> Outstanding	<u> </u> Above Standard	<u> </u> Satisfactory	<u> </u> Needs Improvement	<u> </u> Unacceptable
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- e. Sorts, stamps, distributes, sends out and picks up mail: Mail is dispatched promptly; delays in mail handling are infrequent.

<u> </u> Outstanding	<u> </u> Above Standard	<u> </u> Satisfactory	<u> </u> Needs Improvement	<u> </u> Unacceptable
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Overall Performance Rating for Objective

<u> </u> Outstanding	<u> </u> Above Standard	<u> </u> Satisfactory	<u> </u> Needs Improvement	<u> </u> Unacceptable
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D) PERFORMANCE OBJECTIVE: Obtains, organizes and compiles information and data.	Weight _____
(Multiplied by)	
Performance Value _____	
Total _____	

Standards of Performance:

- a. Gathers information and data from sources and resources such as files, reports, meetings, library, client, program units, etc. Knows and uses available sources. Gathers information in a timely manner (by deadline or within a reasonable time). Information is accurate, complete, relevant, current.

<u> </u> Outstanding	<u> </u> Above Standard	<u> </u> Satisfactory	<u> </u> Needs Improvement	<u> </u> Unacceptable
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- b. Organizes and assembles materials (e.g., written, typed, copies) which provide information for meetings, reports, printing, inquiries, or clarification of problems, etc.: Materials are assembled or compiled in the appropriate manner.

<u> </u> Outstanding	<u> </u> Above Standard	<u> </u> Satisfactory	<u> </u> Needs Improvement	<u> </u> Unacceptable
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- c. Gets information (written or oral) from staff members in the form of, or for preparation of reports and work forms: Reviews content for correct format and completeness before submission to appropriate party. Records information for later reference.

<u> </u> Outstanding	<u> </u> Above Standard	<u> </u> Satisfactory	<u> </u> Needs Improvement	<u> </u> Unacceptable
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Overall Performance Rating for Objective

<u> </u> Outstanding	<u> </u> Above Standard	<u> </u> Satisfactory	<u> </u> Needs Improvement	<u> </u> Unacceptable
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E) PERFORMANCE OBJECTIVE: Makes arrangements and coordinates or schedules events.

Weight _____
(Multiplied by)
Performance Value _____
Total _____

Standards of Performance:

- a. Gets information about dates, times, places, etc., in order to plan meetings or prepare calendar.

☐ Outstanding ☐ Above Standard ☐ Satisfactory ☐ Needs Improvement ☐ Unacceptable

- b. Gets information topics for meetings.

☐ Outstanding ☐ Above Standard ☐ Satisfactory ☐ Needs Improvement ☐ Unacceptable

- c. Handles requests for meetings or conferences as part of scheduling appointments; uses good judgment; knows schedule and supervisors time allocation preferences.

☐ Outstanding ☐ Above Standard ☐ Satisfactory ☐ Needs Improvement ☐ Unacceptable

- d. Makes arrangements for meetings, travel, training sessions, etc: Makes reservations; gets equipment and supplies; gets tickets; discusses room layout; prepares forms.

☐ Outstanding ☐ Above Standard ☐ Satisfactory ☐ Needs Improvement ☐ Unacceptable

- e. Checks with staff and others to verify and update information on the calendar, agenda, or notice before circulating or posting.

☐ Outstanding ☐ Above Standard ☐ Satisfactory ☐ Needs Improvement ☐ Unacceptable

Overall Performance Rating for Objective

☐ Outstanding ☐ Above Standard ☐ Satisfactory ☐ Needs Improvement ☐ Unacceptable

F) PERFORMANCE OBJECTIVE: Records transactions, and maintains accounts; computes figures for reports, documents and recordkeeping. Processes requests, applications, documents, etc.	Weight _____ (Multiplied by) Performance Value _____ Total _____
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Standards of Performance:

- a. Prepares forms, vouchers, billings, permits, licenses, etc.: Forms are filled out legibly, accurately and completely.

<u> </u> Outstanding	<u> </u> Above Standard	<u> </u> Satisfactory	<u> </u> Needs Improvement	<u> </u> Unacceptable
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- b. Accepts fees or payments; issues receipts: errors are infrequent; recordkeeping is complete.

<u> </u> Outstanding	<u> </u> Above Standard	<u> </u> Satisfactory	<u> </u> Needs Improvement	<u> </u> Unacceptable
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- c. Processes transactions, requests, applications, cases, permits and licenses issued, etc.

<u> </u> Outstanding	<u> </u> Above Standard	<u> </u> Satisfactory	<u> </u> Needs Improvement	<u> </u> Unacceptable
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- d. Maintains accounts - makes ledger entries.

<u> </u> Outstanding	<u> </u> Above Standard	<u> </u> Satisfactory	<u> </u> Needs Improvement	<u> </u> Unacceptable
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- e. Records hours worked and leave taken on time and attendance sheets.

<u> </u> Outstanding	<u> </u> Above Standard	<u> </u> Satisfactory	<u> </u> Needs Improvement	<u> </u> Unacceptable
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- f. Counts and inventories supplies; purchases supplies; stores or distributes supplies to make them available to staff: Uses prescribed procedures for ordering supplies and equipment.

<u> </u> Outstanding	<u> </u> Above Standard	<u> </u> Satisfactory	<u> </u> Needs Improvement	<u> </u> Unacceptable
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- g. Worker's manner is courteous, pleasant and helpful.

<u> </u> Outstanding	<u> </u> Above Standard	<u> </u> Satisfactory	<u> </u> Needs Improvement	<u> </u> Unacceptable
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Overall Performance Rating for Objective

<u> </u> Outstanding	<u> </u> Above Standard	<u> </u> Satisfactory	<u> </u> Needs Improvement	<u> </u> Unacceptable
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FISH AND GAME POSITIONS

Elements

- A) Patrols reservation roads, hunting, fishing and recreational areas.
- B) Performs public relations work.
- C) Keeps records, and makes reports of activities, incidents and other items.
- D) Acts as Officer of the Court.
- E) Provides assistance to wildlife research studies and to fisheries management.
- F) Conducts investigations and maintains relations with state and federal agencies.

A) PERFORMANCE OBJECTIVE: Patrols reservation roads, hunting, fishing and recreational areas. (Multiplied by) Weight _____
 Performance Value _____
 Total _____

STANDARDS OF PERFORMANCE:

- a. Patrols areas designated by immediate supervisor: Patrols or checks out highways, back roads, camping areas, etc; submits monthly patrol activities report.

___ Outstanding ___ Above ___ Satisfactory ___ Needs ___ Unacceptable
 Standard Improvement

- b. Posts signs in the area: puts signs in conspicuous places; replaces signs as needed.

___ Outstanding ___ Above ___ Satisfactory ___ Needs ___ Unacceptable
 Standard Improvement

- c. Sets and checks traps in the area: has or gains knowledge of trapping skills; applies these skills to catch animals; in placing the traps, considers the possibility that people may discover, disturb or step on the traps.

___ Outstanding ___ Above ___ Satisfactory ___ Needs ___ Unacceptable
 Standard Improvement

- d. Checks people for recreation permits: if they don't have permission to be in the area, then enforces this tribal regulation; notes the incident for later reporting.

___ Outstanding ___ Above ___ Satisfactory ___ Needs ___ Unacceptable
 Standard Improvement

- e. Stays alert for any violators of tribal regulations: enforces the law and follows department procedure in handling violations; uses good judgment and tact in confronting individuals and groups.

___ Outstanding ___ Above ___ Satisfactory ___ Needs ___ Unacceptable
 Standard Improvement

- f. Checks for and reports abandoned vehicles: determines if the vehicle is abandoned or if it is likely the driver will return to it; considers reports of or own knowledge that people are hunting, fishing, working or hiking in the area; takes appropriate action and follows up on the situation.

___ Outstanding ___ Above ___ Satisfactory ___ Needs ___ Unacceptable
 Standard Improvement

- g. Initiates or assists in any search and rescue operations.

___ Outstanding ___ Above ___ Satisfactory ___ Needs ___ Unacceptable
 Standard Improvement

Overall Performance Rating for Objective

___ Outstanding ___ Above ___ Satisfactory ___ Needs ___ Unacceptable
 Standard Impro

B) PERFORMANCE OBJECTIVE: Performs public relations work.

Weight _____
(Multiplied by)
Performance Value _____
Total _____

Standards of Performance:

- a. Gives presentations at schools, senior citizens programs, and other departments: gears the presentation to the level of audience and their likely interests. The information presented is thorough, accurate and timely; encourages questions and input from the audience, as appropriate; explains plans and policies and shares information of mutual interest.

____ Outstanding ____ Above ____ Satisfactory ____ Needs ____ Unacceptable
 Standard Improvement

- b. Participates at public activities that would pertain to the good of the department.

____ Outstanding ____ Above ____ Satisfactory ____ Needs ____ Unacceptable
 Standard Improvement

c.

____ Outstanding ____ Above ____ Satisfactory ____ Needs ____ Unacceptable
 Standard Improvement

d.

____ Outstanding ____ Above ____ Satisfactory ____ Needs ____ Unacceptable
 Standard Improvement

Overall Performance Rating for objective

____ Outstanding ____ Above ____ Satisfactory ____ Needs ____ Unacceptable
 Standard Improvement

- | | | |
|-------------------|--------|-------|
| | Weight | _____ |
| (Multiplied by) | | |
| Performance Value | | _____ |
| Total | | |

a. Turns in information in a timely manner: for example--patrol activities monthly report, vehicle monthly report.

b. Follows policies and procedures in recording and reporting information.

c. Information is accurate, complete and checks out with other records and sources.

d. Reports all recreation permit violations.

e. Keeps records of maintenance, costs and servicing of vehicle.

f.

g.

Overall Performance Rating for Objective

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

D) PERFORMANCE OBJECTIVE: Acts as officer of the court.

Weight _____
(Multiplied by)
Performance Value _____
Total _____

Standards of Performance:

a. Investigates violations.

___ Outstanding ___ Above Standard ___ Satisfactory ___ Needs Improvement ___ Unacceptable

b. Confiscates evidence.

___ Outstanding ___ Above Standard ___ Satisfactory ___ Needs Improvement ___ Unacceptable

c. Issues citations.

___ Outstanding ___ Above Standard ___ Satisfactory ___ Needs Improvement ___ Unacceptable

d. Has adequate knowledge of pertinent tribal, state and federal regulations.

___ Outstanding ___ Above Standard ___ Satisfactory ___ Needs Improvement ___ Unacceptable

e.

___ Outstanding ___ Above Standard ___ Satisfactory ___ Needs Improvement ___ Unacceptable

f.

___ Outstanding ___ Above Standard ___ Satisfactory ___ Needs Improvement ___ Unacceptable

Overall Performance Rating for Objective:

___ Outstanding ___ Above Standard ___ Satisfactory ___ Needs Improvement ___ Unacceptable

E) PERFORMANCE OBJECTIVE: Provides assistance to wildlife research studies and to fisheries management.

Weight _____
(Multiplied by)
Performance Value _____
Total _____

Standards of Performance:

a. Assists the wildlife biologist with bears.

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

b. Assists the wildlife biologist with creel studies.

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

c. Assists the wildlife biology goose study.

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

d. Assists the Federal Bureau of Fisheries with the fish plant.

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

e.

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

f.

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

Overall Performance Rating for Objective

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

- Weight _____
(Multiplied by)
Performance Value _____
Total _____

a. Completes work assignments in a timely and thorough manner.

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

_____ Outstanding _____ Above Standard _____ Satisfactory _____ Needs Improvement _____ Unacceptable

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

k. Washes windows and walls.

1.

III.

Overall Performance Rating on Objective:

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

B) PERFORMANCE OBJECTIVE: Performs a variety of routine outside maintenance or cleanup work.

Weight _____
(Multiplied by)
Performance Value _____
Total _____

Standards of Performance:

a. Tends lawns, trims shrubs, cleans walks outside the building, etc.

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

b. Removes snow and ice from walkways, parking lot and so on.

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

c.

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

d.

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

Overall Performance Rating for Objective:

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

(Multiplied by) Weight _____
 Performance Value _____
 Total _____

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

Weight _____
(Multiplied by)
Performance Value _____
Total _____

a. Repairs faucets; unstops toilets; replaces lightbulbs, etc.

b. Reports damage to structures and equipment.

c. Follows up, in a timely manner, on complaints or job requests.

d.

e.

Overall Performance Rating for Objective:

35

E) PERFORMANCE OBJECTIVE: Performs periodic preventive maintenance or scheduled maintenance work.

Weight _____
(Multiplied by)
Performance Value _____
Total _____

Standards of Performance:

a. Reports damage to structures and equipment.

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

b. Performs inspections on equipment, buildings, fixtures and facilities, etc.

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

c. Services and maintains structures, components and equipment .

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

d. Follows safety procedures and instructions in performing the work.

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

e.

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

f.

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

Overall Performance Rating for Objective:

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

F) PERFORMANCE OBJECTIVE: Performs miscellaneous tasks, as assigned.

Weight _____
(Multiplied by)
Performance Value _____
Total _____

Standards of Performance:

a. Moves furniture.

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

b. Lifts boxes; loads and unloads materials from conveyances.

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

c.

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

d.

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

Overall Performance Rating for Objective:

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

MANAGEMENT POSITIONS

Elements

- A) Develops plans and objectives. Sets priorities on objectives. Develops policies and procedures. Establishes budget.
- B) Consults, advises and gets input of Council and other relevant parties. Articulates and communicates objectives and other information. Makes decisions to facilitate program accomplishment.
- C) Delegates work. Monitors work progress. Gives technical advice.
- D) Carries out personnel management functions including the selection, placement, development and appraisal of employees.
- E) Manages performance through the use of appropriate rewards, provision of timely information and taking corrective action.
- F) Develops and uses procedures and guidelines to review program quality and progress. Revises programs as needed, based on review of results. Revises procedures as required.

A) PERFORMANCE OBJECTIVE: Develops plans and objectives. Weight _____
 Sets priorities on objectives. Develops (Multiplied by)
 policies and procedures. Establishes budget. Performance Value _____
 Total _____

Standards of Performance:

a. Sets realistic objectives that are responsive to tribal goals and priorities.

____ Outstanding ____ Above ____ Satisfactory ____ Needs ____ Unacceptable
 Standard Improvement

b. Develops effective approaches for meeting program objectives.

____ Outstanding ____ Above ____ Satisfactory ____ Needs ____ Unacceptable
 Standard Improvement

c. Plans specific milestones to permit successful monitoring and control of program activities.

____ Outstanding ____ Above ____ Satisfactory ____ Needs ____ Unacceptable
 Standard Improvement

d.

____ Outstanding ____ Above ____ Satisfactory ____ Needs ____ Unacceptable
 Standard Improvement

e.

____ Outstanding ____ Above ____ Satisfactory ____ Needs ____ Unacceptable
 Standard Improvement

Overall Performance Rating for Objective:

____ Outstanding ____ Above ____ Satisfactory ____ Needs ____ Unacceptable
 Standard Improvement

B) PERFORMANCE OBJECTIVE: Consults, advises and gets input of Council and other relevant parties. Articulates and communicates objectives and other information. Makes decisions to facilitate program accomplishment.	Weight _____ (Multiplied by) Performance Value _____ Total _____
--	---

Standards of Performance:

a. Relates specific program outcomes to tribal goals.

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

b. Keeps staff, council and other organizations informed about significant matters in a timely manner.

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

c. Meets objectives on time and within budget allocations.

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

d. Develops and maintains good working relationships with Council, top management, and other organizations.

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

e.

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

f.

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

Overall Performance Rating for Objective:

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

- C) PERFORMANCE OBJECTIVE: Directs and delegates work.
Monitors work progress. Gives technical advice.

Weight _____
(Multiplied by) _____
Performance Value _____
Total _____

Standards of Performance:

- a. Work assignments are made in a clear and timely manner.

____ Outstanding ____ Above ____ Satisfactory ____ Needs ____ Unacceptable
 Standard Improvement

- b. Determines priorities of work activities.

____ Outstanding ____ Above ____ Satisfactory ____ Needs ____ Unacceptable
 Standard Improvement

- c. Distributes the work in a manner to expedite its completion and to equalize the workload.

____ Outstanding ____ Above ____ Satisfactory ____ Needs ____ Unacceptable
 Standard Improvement

- d. Tells employees what is expected of them.

____ Outstanding ____ Above ____ Satisfactory ____ Needs ____ Unacceptable
 Standard Improvement

- e. Gives technical advice as required and promptly reviews work on completion or in progress.

____ Outstanding ____ Above ____ Satisfactory ____ Needs ____ Unacceptable
 Standard Improvement

- f. Holds employees responsible for timely completion of work assignments.

____ Outstanding ____ Above ____ Satisfactory ____ Needs ____ Unacceptable
 Standard Improvement

g.

____ Outstanding ____ Above ____ Satisfactory ____ Needs ____ Unacceptable
 Standard Improvement

h.

____ Outstanding ____ Above ____ Satisfactory ____ Needs ____ Unacceptable
 Standard Improvement

Overall Performance Rating for Objective:

____ Outstanding ____ Above ____ Satisfactory ____ Needs ____ Unacceptable
 Standard Improvement

D) PERFORMANCE OBJECTIVE: Carries out personnel management functions including the selection, placement, development and appraisal of employees.	Weight _____
	(Multiplied by) _____
	Performance Value _____
	Total _____

Standards of Performance:

- a. Applies tribal personnel policies and procedures in carrying out personnel actions.

☐ Outstanding ☐ Above Standard ☐ Satisfactory ☐ Needs Improvement ☐ Unacceptable

- b. Orients new employees in a timely manner.

☐ Outstanding ☐ Above Standard ☐ Satisfactory ☐ Needs Improvement ☐ Unacceptable

- c. Appraises the performance of individual staff members in a timely manner and discusses this with each.

☐ Outstanding ☐ Above Standard ☐ Satisfactory ☐ Needs Improvement ☐ Unacceptable

- d. Uses available training sources, assignments and projects to provide individual development for the staff.

☐ Outstanding ☐ Above Standard ☐ Satisfactory ☐ Needs Improvement ☐ Unacceptable

- e.

☐ Outstanding ☐ Above Standard ☐ Satisfactory ☐ Needs Improvement ☐ Unacceptable

- f.

☐ Outstanding ☐ Above Standard ☐ Satisfactory ☐ Needs Improvement ☐ Unacceptable

Overall Performance Rating for Objective:

☐ Outstanding ☐ Above Standard ☐ Satisfactory ☐ Needs Improvement ☐ Unacceptable

- E) PERFORMANCE OBJECTIVE: Manages performance through appropriate rewards, provision of timely information, and taking corrective action.

Weight _____
(Multiplied by)
Performance Value _____
Total _____

Standards of Performance:

- a. Provides staff with feedback on their performance.

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

- b. Promptly recognizes accomplishments of subordinates.

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

- c. Takes steps to remove or improve the work of poor performers.

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

- d.

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

- e.

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

Overall Performance Rating for Objective:

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

F) PERFORMANCE OBJECTIVE: Develops and uses procedures and guidelines to review program quality and progress. Revises programs as needed, based on review of results. Revises procedures as required.	Weight _____ (Multiplied by) Performance Value _____ Total _____
---	---

Standards of Performance:

- a. Determines that review/monitoring procedures and guidelines are clearly and concisely stated.

_____ Outstanding _____ Above Standard _____ Satisfactory _____ Needs Improvement _____ Unacceptable

- b. Uses monitoring and evaluation procedures which ensure that outputs are of good quality and on time.

_____ Outstanding _____ Above Standard _____ Satisfactory _____ Needs Improvement _____ Unacceptable

- c. Recognizes when current review is inadequate and makes appropriate changes.

_____ Outstanding _____ Above Standard _____ Satisfactory _____ Needs Improvement _____ Unacceptable

d.

_____ Outstanding _____ Above Standard _____ Satisfactory _____ Needs Improvement _____ Unacceptable

e.

_____ Outstanding _____ Above Standard _____ Satisfactory _____ Needs Improvement _____ Unacceptable

Overall Performance Rating for Objective:

_____ Outstanding _____ Above Standard _____ Satisfactory _____ Needs Improvement _____ Unacceptable

PROPERTY AND SUPPLY CLERK POSITIONS

Elements

- A) Stocks items of inventory in the warehouse. Organizes and maintains warehouse layout and floors. Monitors stock levels.
- B) Receives and processes incoming shipments of freight, including pricing and billing departments for items that are ordered.
- C) Picks up and delivers supplies, equipment and other items.
- D) Observes all safety rules and regulations pertaining to materials handling.
- E) Operates and uses tribal equipment.

A) PERFORMANCE OBJECTIVE: Stocks items of inventory in the warehouse. Organizes and maintains warehouse layout and floors. Monitors stock levels.	Weight _____
	(Multiplied by)
	Performance Value _____
	Total _____

Standards of Performance:

- a. Arranges warehouse inventory in a consistent and uniform way following established methods and procedures.

☐ Outstanding ☐ Above Standard ☐ Satisfactory ☐ Needs Improvement ☐ Unacceptable

- b. Has knowledge of the items and their location within the warehouse: items are easily located.

☐ Outstanding ☐ Above Standard ☐ Satisfactory ☐ Needs Improvement ☐ Unacceptable

- c. Monitors stock levels to keep track of the quantity of inventory. Reports findings to supervisor: keeps accurate records; reports are submitted in a timely manner.

☐ Outstanding ☐ Above Standard ☐ Satisfactory ☐ Needs Improvement ☐ Unacceptable

- d. Keeps warehouse floors and work area clean and organized.

☐ Outstanding ☐ Above Standard ☐ Satisfactory ☐ Needs Improvement ☐ Unacceptable

e.

☐ Outstanding ☐ Above Standard ☐ Satisfactory ☐ Needs Improvement ☐ Unacceptable

f.

☐ Outstanding ☐ Above Standard ☐ Satisfactory ☐ Needs Improvement ☐ Unacceptable

Overall Performance Rating for Objective:

☐ Outstanding ☐ Above Standard ☐ Satisfactory ☐ Needs Improvement ☐ Unacceptable

B) PERFORMANCE OBJECTIVE: Receives and processes incoming shipments of freight, including pricing and billing departments for items that are ordered.

Weight _____
(Multiplied by)
Performance Value _____
Total _____

Standards of Performance:

- a. Receives incoming freight and promptly prepares a receiving record; verifies the items, their quantity and specifications; notes any shortages, damages, or backorders; turns in receiving records to supervisor.

____ Outstanding ____ Above ____ Satisfactory ____ Needs ____ Unacceptable
 Standard Improvement

- b. Items ordered by department are properly invoiced out, and priced correctly. Prices are calculated less any applicable discounts or reflect any added charges.

____ Outstanding ____ Above ____ Satisfactory ____ Needs ____ Unacceptable
 Standard Improvement

- c. Incoming warehouse stock items are marked in a timely manner.

____ Outstanding ____ Above ____ Satisfactory ____ Needs ____ Unacceptable
 Standard Improvement

d.

____ Outstanding ____ Above ____ Satisfactory ____ Needs ____ Unacceptable
 Standard Improvement

e.

____ Outstanding ____ Above ____ Satisfactory ____ Needs ____ Unacceptable
 Standard Improvement

Overall Performance Rating for Objective:

____ Outstanding ____ Above ____ Satisfactory ____ Needs ____ Unacceptable
 Standard Improvement

	Weight	
(Multiplied by)		
Performance Value		
Total		

a. Supplies or items ordered by departments are correctly filled and delivered to the right place and delivered at the scheduled time.

b. Picks up supplies or equipment that have been ordered from vendors.

c. Maintains effective working relationships with other department personnel and with people in private industry: complaints and problems are kept to a minimum.

d.

e.

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

D) PERFORMANCE OBJECTIVE: Observes all safety rules and regulations pertaining to materials handling.	Weight	_____
	(Multiplied by)	
	Performance Value	_____
	Total	_____

Standards of Performance:

- a. Has a knowledge of and uses safety rules and regulations at all times when handling material.

☐ Outstanding
 ☐ Above Standard
 ☐ Satisfactory
 ☐ Needs Improvement
 ☐ Unacceptable

- b. Has no on-the-job injuries or accidents due to carelessness, negligence or misconduct.

☐ Outstanding
 ☐ Above Standard
 ☐ Satisfactory
 ☐ Needs Improvement
 ☐ Unacceptable

c.

☐ Outstanding
 ☐ Above Standard
 ☐ Satisfactory
 ☐ Needs Improvement
 ☐ Unacceptable

d.

☐ Outstanding
 ☐ Above Standard
 ☐ Satisfactory
 ☐ Needs Improvement
 ☐ Unacceptable

Overall Performance Rating for Objective:

☐ Outstanding
 ☐ Above Standard
 ☐ Satisfactory
 ☐ Needs Improvement
 ☐ Unacceptable

Weight _____
(Multiplied by)
Performance Value _____
Total _____

a. Operates motor vehicle as necessary: follows applicable laws (e.g., pertaining to motor vehicle operation) and safety requirements; receives no traffic or parking tickets; has no accidents due to careless or negligent operation.

b. Operates electronic calculator to figure prices to mark inventory items: figures are correctly calculated.

c.

___ Outstanding	___ Above Standard	___ Satisfactory	___ Needs Improvement	___ Unacceptable
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d.

___ Outstanding	___ Above Standard	___ Satisfactory	___ Needs Improvement	___ Unacceptable
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____ Outstanding ____ Above Standard ____ Satisfactory ____ Needs Improvement ____ Unacceptable

CONFEDERATED SALISH AND KOOTENAI TRIBES
PERFORMANCE PLANNING AND REVIEW FORM

1. EMPLOYEE'S NAME-LAST, FIRST, MIDDLE	2. DEPARTMENT	3. DIVISION OR AGENCY
4. SOCIAL SECURITY NO.	5. CLASS TITLE, GRADE & STEP	6. REPORT PERIOD From: To:
7. REASON FOR REPORT		
<p>8. GENERAL INSTRUCTIONS</p> <p>PLEASE COMPLETE THE PERFORMANCE RATING FOR THE POSITION INDICATED ABOVE. FOLLOW THE INSTRUCTIONS IN THE SUPERVISOR'S PERFORMANCE AND REVIEW MANUAL" IN COMPLETING THESE FORMS. THREE COPIES WILL BE COMPLETED WITH THE ORIGINAL FORWARDED TO THE PERSONNEL OFFICE, ONE COPY GIVEN TO THE PROGRAM OFFICE AND ONE COPY GIVEN TO THE EMPLOYEE EVALUATED.</p>		
9. MISSION STATEMENT:		
<div style="display: flex; justify-content: space-between;"> <div style="width: 60%;"> <p>10. OVERALL EMPLOYEE EVALUATION</p> <p>TOTAL OF PERFORMANCE VALUES _____</p> <p>REFER TO THE SUPERVISOR'S PERFORMANCE PLANNING AND REVIEW MANUAL TO DETERMINE OVERALL EVALUATION.</p> </div> <div style="width: 35%;"> <p><input type="checkbox"/> OUTSTANDING (34-50)</p> <p><input type="checkbox"/> ABOVE STANDARD (27-33.9)</p> <p><input type="checkbox"/> SATISFACTORY (20-26.9)</p> <p><input type="checkbox"/> NEEDS IMPROVEMENT (10-19.9)</p> <p><input type="checkbox"/> UNACCEPTABLE (0-9.9)</p> </div> </div>		
(COMPLETE ITEMS 11-13 UPON COMPLETION OF BLOCKS 14-19.)		
<p>11. _____ DATE _____</p> <p style="margin-left: 40px;">SUPERVISOR'S NAME AND SIGNATURE</p>		
<p>12. _____ DATE _____</p> <p style="margin-left: 40px;">NEXT HIGHER LEVEL SUPERVISOR'S SIGNATURE</p>		
<p>13. THE PERFORMANCE PLAN AND REVIEW HAVE BEEN DISCUSSED WITH MY SUPERVISOR.</p> <div style="display: flex; justify-content: space-between;"> <div style="width: 60%;"> <p>_____ EMPLOYEE'S SIGNATURE</p> </div> <div style="width: 35%;"> <p>_____ DATE</p> </div> </div>		

14. PERFORMANCE STANDARDS

PERFORMANCE OBJECTIVE: _____

Weight _____

(Multiplied by)

Standards of Performance:

Performance Value _____

Total _____

a.

☐ Outstanding ☐ Above Standard ☐ Satisfactory ☐ Needs Improvement ☐ Unacceptable

b.

☐ Outstanding ☐ Above Standard ☐ Satisfactory ☐ Needs Improvement ☐ Unacceptable

c.

☐ Outstanding ☐ Above Standard ☐ Satisfactory ☐ Needs Improvement ☐ Unacceptable

Overall Performance Rating for Objective

☐ Outstanding ☐ Above Standard ☐ Satisfactory ☐ Needs Improvement ☐ Unacceptable

PERFORMANCE OBJECTIVE: _____

Weight _____

(Multiplied by)

Performance Value _____

Total _____

a.

☐ Outstanding ☐ Above Standard ☐ Satisfactory ☐ Needs Improvement ☐ Unacceptable

b.

☐ Outstanding ☐ Above Standard ☐ Satisfactory ☐ Needs Improvement ☐ Unacceptable

c.

☐ Outstanding ☐ Above Standard ☐ Satisfactory ☐ Needs Improvement ☐ Unacceptable

15. Narrative Statement - (Assess overall performance)

16. Strengths:

17. Weakness:

18. Other Comments: (Refer to Supervisor's Guide)

19. Employee Comments: